Technical Meeting with Carriers
November 8, 2012

ID	Topic	Facilitator	Duration
1.	Welcome • Introductions • Purpose of the Meeting	Brad Finnegan Gena Cruciani Jacques Michel	15 Min
1.	Testing • Testing phases • Functional implementation timeline • Releases • Testing Approach • What is needed from carriers	Sandeep Sharma (Deloitte)	40 Min
1.	Discussion	Brad Finnegan Jacques Michel	15 Min
1.	Collection of Plan data	Michael Arnis Ashley Stamets Jacques Michel	30 Min
1.	Wrap up and next steps		5 Min

Washington Health Benefit Exchange
Plan Management Testing

November 7, 2012

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Discussion Goals

- Focus on how Issuers will work with HBE to test HBE system

- Define testing timeline and readiness expectations

- Will not focus on operational readiness activities and testing of Issuer systems

Contents

- Testing Phases and Ownership

- Functionality Implementation Timeline and Key Dates

- WA HBE Releases

- Testing Approach

- What We Need From You

- Plan Management Testing

    o Issuer Testing Approach

    o Issuer Involvement in Product Center Testing

- Open Enrollment Testing

    o Issuer Testing Approach

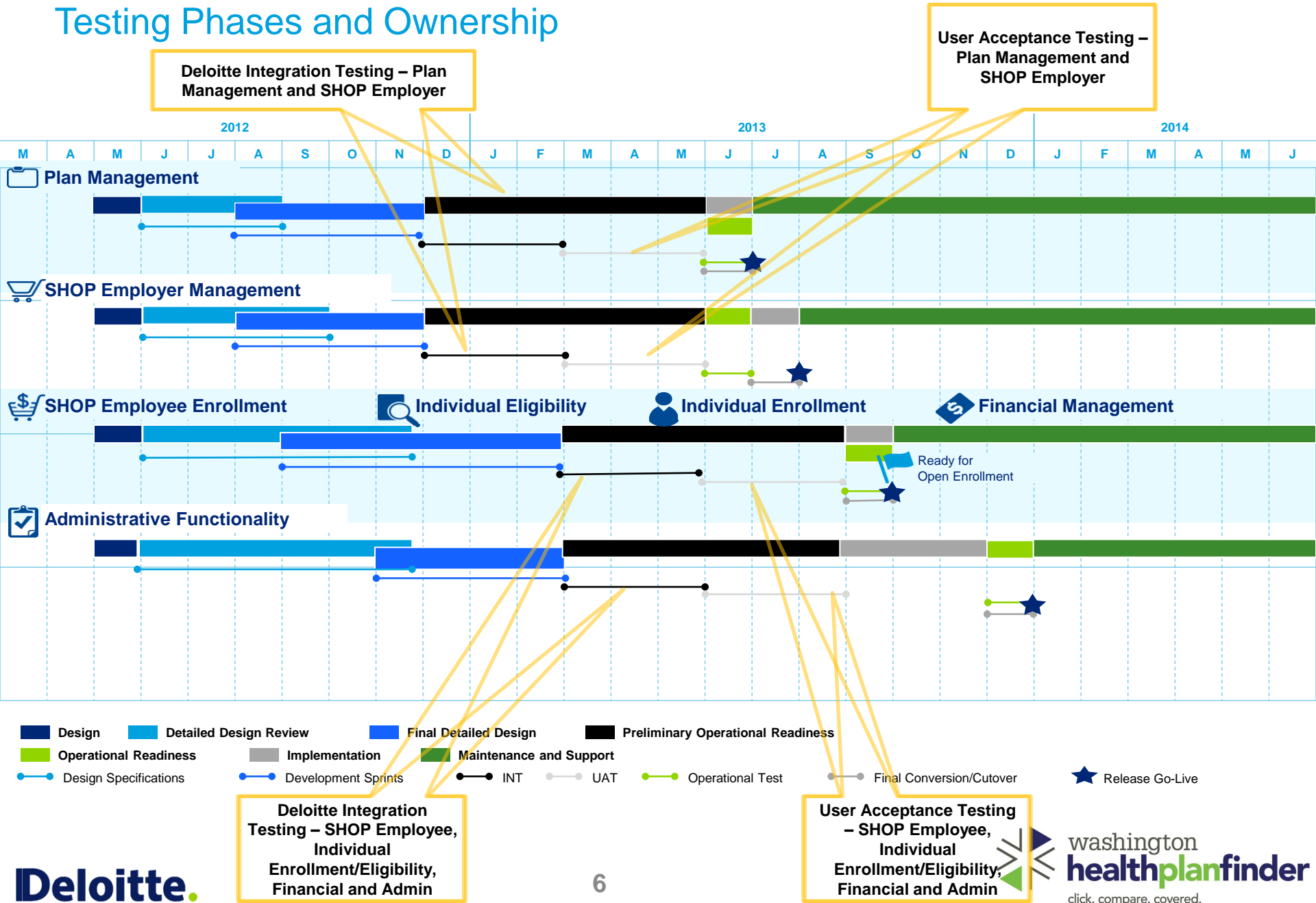   o Issuer Involvement in Provider Search Testing

Washington Health Benefits Exchange
Testing Phases and Ownership

- **System Testing**

  - Involves component level testing using agile methodology working together with the Application Development team

  - Deloitte team owns creation and execution of Test Scripts

- **Integration/Interface Testing**

  - Involves end-to-end functionality testing

  - includes interface partners for interface testing

  - Deloitte team owns creation and execution of test scripts. Input sought from interface partners for interface test scripts

  - Testing data created and used. Needs coordination with interface partners

- **User Acceptance Testing (UAT)**

  - Involves end-to-end functionality testing by users

  - includes interface partners for interface testing

  - HBE owns execution of test scripts. Deloitte team to support

  - Testing data created is close to real life. Needs coordination with interface partners

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Testing Phases and Ownership

Deloitte Integration Testing – Plan Management and SHOP Employer

User Acceptance Testing – Plan Management and SHOP Employer

Deloitte Integration Testing – SHOP Employee, Individual Enrollment/Eligibility, Financial and Admin

User Acceptance Testing – SHOP Employee, Individual Enrollment/Eligibility, Financial and Admin

2012 | 2013 | 2014

M A M J J A S O N D J F M A M J J A S O N D J F M A M J

- Plan Management
- SHOP Employer Management
- SHOP Employee Enrollment — Individual Eligibility — Individual Enrollment — Financial Management
- Administrative Functionality

Ready for Open Enrollment

Legend:
- Design
- Detailed Design Review
- Final Detailed Design
- Preliminary Operational Readiness
- Operational Readiness
- Implementation
- Maintenance and Support
- Design Specifications
- Development Sprints
- INT
- UAT
- Operational Test
- Final Conversion/Cutover
- Release Go-Live

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Washington Health Benefits Exchange
Key Dates

	Plan Management Release				Open Enrollment Release			
	Plan Management		SHOP Employer		Open Enrollment		Admin	
	Start Date	Finish Date	Start Date	Finish Date	Start Date	Finish Date	Start Date	Finish Date
JAD Sessions	7/9/12	8/30/12	7/16/12	9/14/12	7/16/12	10/26/12	7/16/12	10/26/12
Design Deliverables	7/9/12	9/27/12	7/16/12	10/15/12	7/16/12	11/30/12	7/16/12	11/30/12
Development	7/23/12	1/14/13	8/6/12	1/14/13	8/6/12	4/1/13	8/6/12	4/1/13
Deloitte System Testing	8/13/12	2/1/13	8/28/12	2/1/13	8/27/12	4/12/13	9/4/12	4/12/13
Integration Testing	12/17/12	3/1/13	12/17/12	3/1/13	3/17/13	5/31/13	3/17/13	5/31/13
UAT	3/4/13	5/31/13	3/4/13	5/31/13	6/3/13	8/30/2013	6/3/13	8/30/13
Performance Testing	2/4/13	4/26/13	2/4/13	4/26/13	5/6/13	7/26/13	5/6/13	7/26/13
Go-Live	7/1/13	7/1/13	8/2/13	8/2/13	9/30/13	9/30/13	12/31/13	12/31/13

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Washington Health Benefits Exchange
WA HBE Releases

- **Plan Management Release**

    o Involves Plan Management Processes including Plan Certification, Plan Rates and Benefits

    o Involves SHOP Employer Functionality including Employer Plan Selection, Employee Roster Upload, Employer Provider Search

- **Open Enrollment Release**

    o Involves SHOP Employee, Individual Eligibility, Individual Enrollment and Financial Management Functionality including Plan Shopping, Plan Eligibility, Plan Purchase, Plan Premium Payment and Provider Directory

    o All WA HBE interfaces are included

    o Involves Administration functionality including Reports

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Testing Approach

- User Acceptance Testing for "Plan Management" and "SHOP Employer" functionality will be combined. UAT for these will start in March 2013

- User Acceptance Testing for "SHOP Employee", "Individual Enrollment", "Individual Eligibility", "Financial" and "Admin" functionality will be combined. UAT for these will start in June 2013

- Users will be involved during UAT. Interface partners will be involved during Integration testing to allow Deloitte team to test interfaces

- Integration partners will also be involved during Integration Testing

- A "Ramp up" approach will be used to involve users in testing. A sign up sheet will be provided so that users can sign up in batches

- Deficiencies identified during testing will be logged in the HBE Deficiency Management Tool JIRA. A problem reporting form will be created and used by users to report problems experienced

- Daily meetings will be conducted during testing to discuss key deficiencies identified and their resolution

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Issuer Testing Timeline – Three Groups

Month	1	2	3	4	5	6	7	8	9
Starts on	December 2012	January 2013	February 2013	March 2013	April 2013	May 2013	June 2013	July 2013	August 2013

Plan Management

Group 1

Group 2

Group 3

Open Enrollment

Group 1

Group 2

Group 3

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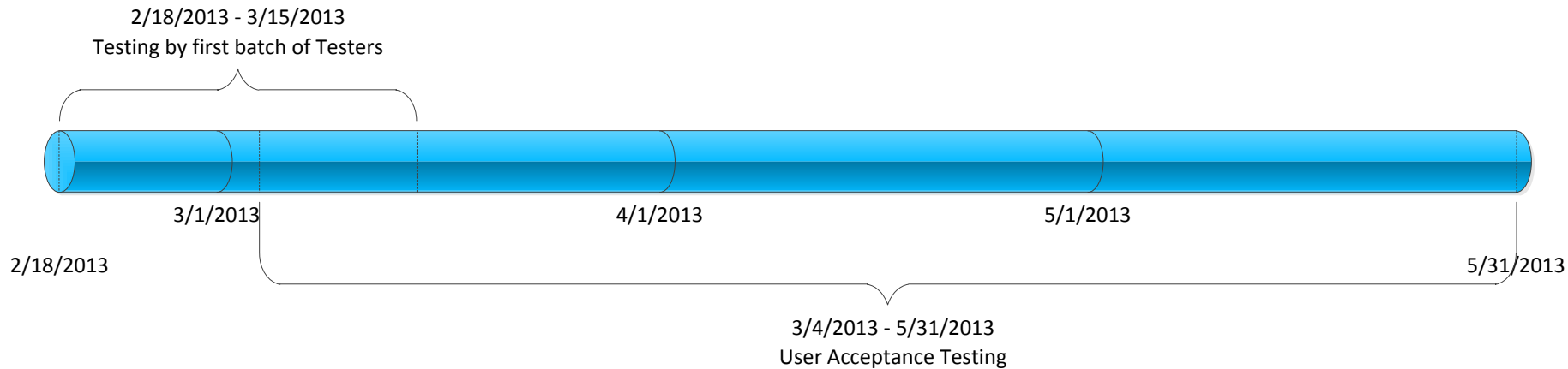
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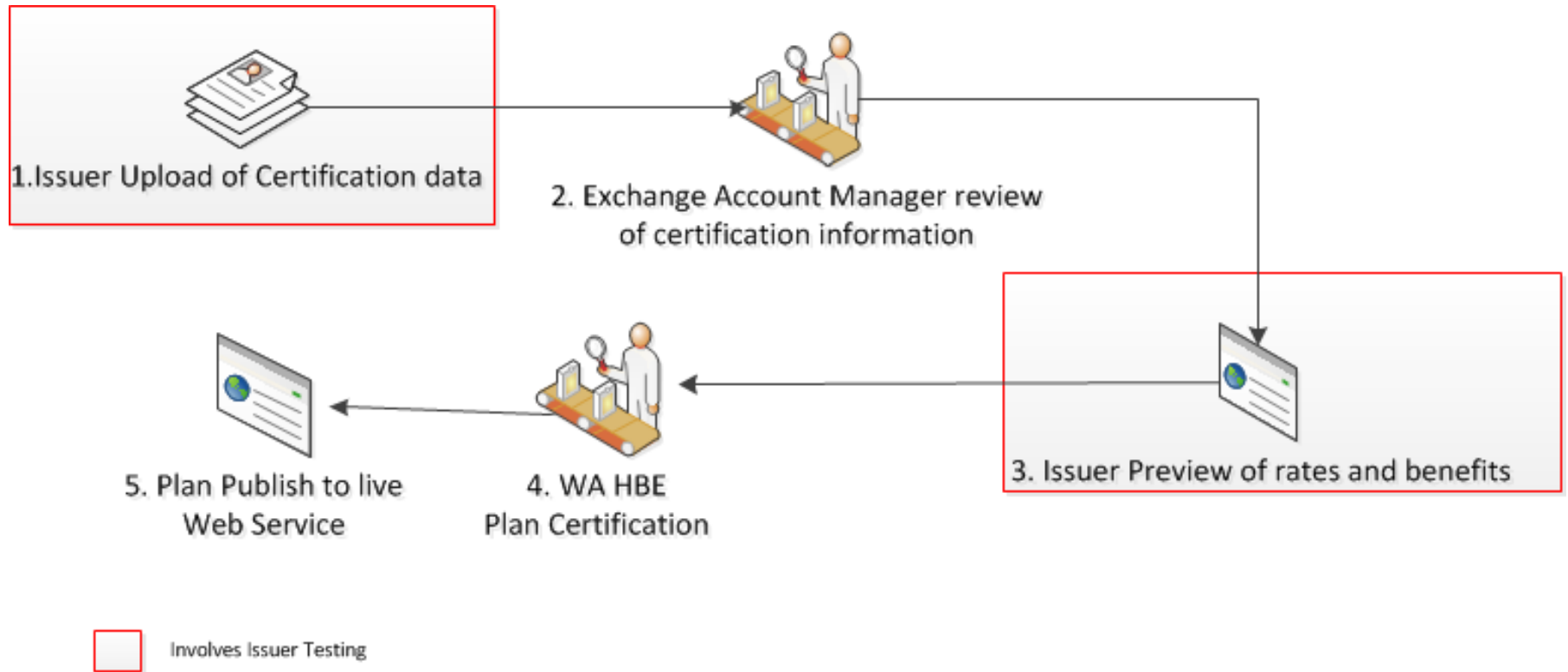
Issuer Testing Readiness Checklist

- Point of contact and established communications

- Testing scenarios and scripts shared

- Issuer testing environment(s) ready

- Issuer target and source systems communicated

- Data creation responsibilities defined and completed

- Testing windows agreed upon

- Participation in deficiency discussion/resolution meetings during Testing agreed upon

Plan Management Release – Issuer Testing Approach

2/18/2013 - 3/15/2013
Testing by first batch of Testers

2/18/2013

3/1/2013

4/1/2013

5/1/2013

5/31/2013

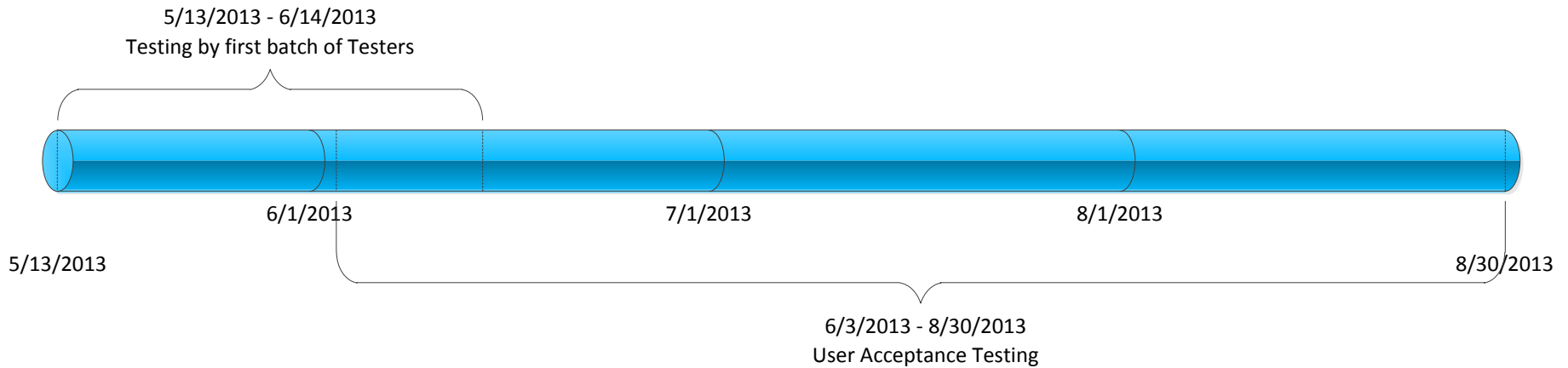3/4/2013 - 5/31/2013
User Acceptance Testing

- First group of testers will be involved at the beginning of UAT or even towards the later part of Integration Testing (In February 2013)

- Issuer testing involves testing of Product Center functionality including Plan Certification, Rates and Benefits

- HBE staff will conduct testing of Product Center functionality including Exchange Account Manager functionality

Plan Management - Issuer Involvement in Product Center Testing

1. Issuer Upload of Certification data

2. Exchange Account Manager review of certification information

3. Issuer Preview of rates and benefits

4. WA HBE Plan Certification

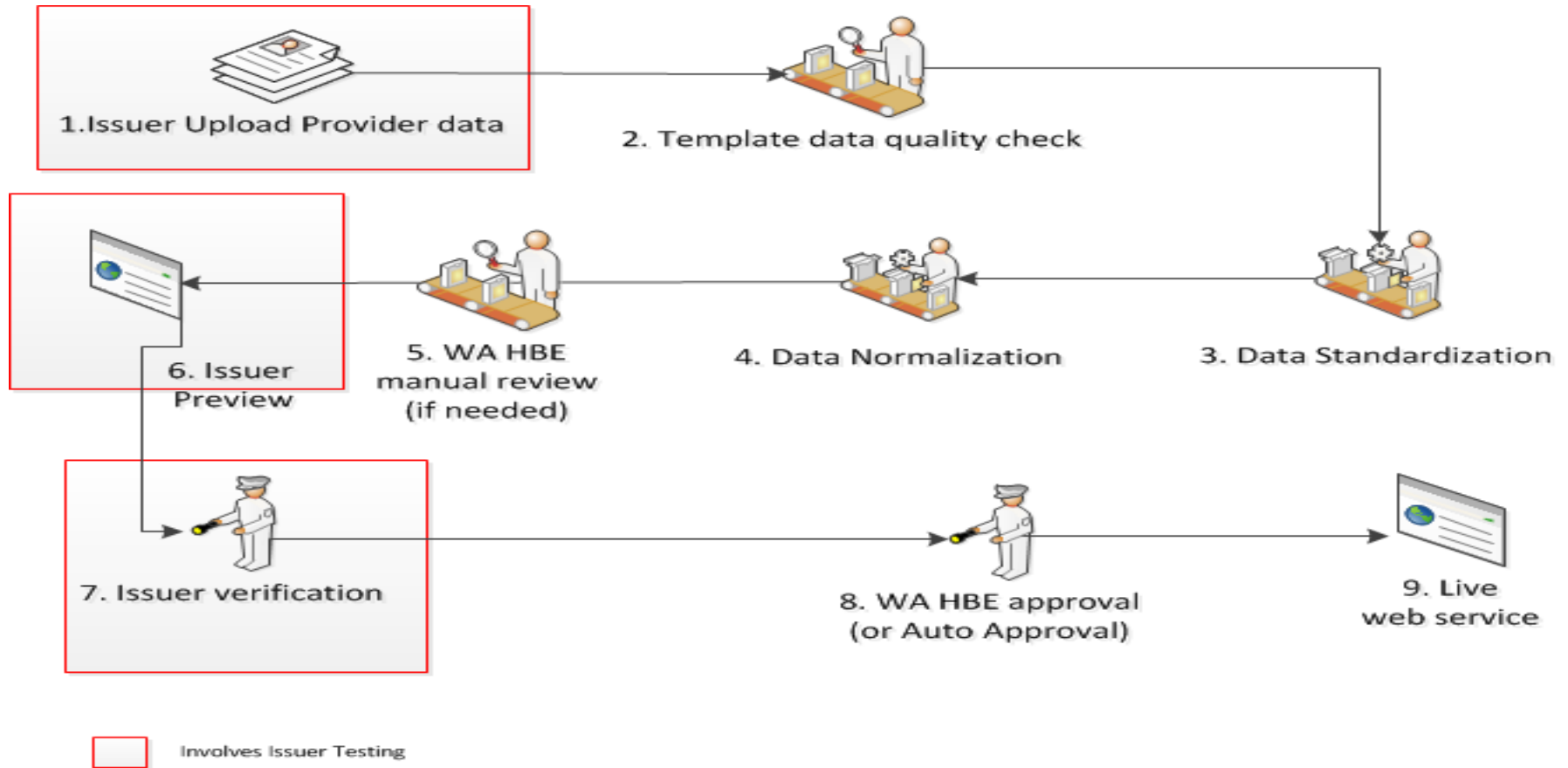5. Plan Publish to live Web Service

Involves Issuer Testing

- Issuers will upload Plan Certification data into the Product Center. They will also review Plan Certification, Rates and Benefits data in the Product Center

Open Enrollment Release – Issuer Testing Approach

5/13/2013 - 6/14/2013
Testing by first batch of Testers

6/1/2013   7/1/2013   8/1/2013

5/13/2013   8/30/2013

6/3/2013 - 8/30/2013
User Acceptance Testing

- First group of testers will be involved at the beginning of UAT or even towards the later part of Integration Testing (In May 2013)

- Issuers will be involved in testing of 834 and 820 interface files used for exchanging enrollment and payment information. They will also be involved in Provider Directory/Provider Search

- HBE staff will conduct testing of the overall Exchange functionality including Eligibility, Enrollment, SHOP, Admin, Reports, Correspondence, Interfaces, Financial Dependency, Reconciliation, Change Reporting, Provider Directory and Provider Search

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Open Enrollment - Issuer Involvement in Provider Search Testing

1. Issuer Upload Provider data
2. Template data quality check
3. Data Standardization
4. Data Normalization
5. WA HBE manual review (if needed)
6. Issuer Preview
7. Issuer verification
8. WA HBE approval (or Auto Approval)
9. Live web service

☐ Involves Issuer Testing

- Issuers will upload Provider data into the Product Center. They will also review and verify standardized/normalized data in the Product Center

Questions

Topics for Upcoming Meetings

November 15 2:00-3:30pm   834 companion guide
November 20 2:00-3:30pm   Enrollment scenarios
November 29 2:00-3:30pm   (Topic TBD)
December 6   2:00-3:30pm   (Topic TBD)
December 13 2:00-3:30pm   (Topic TBD)
December 20 2:00-3:30pm   (Topic TBD)